



Information overload

New technology and gadgets can't be useful if they are detracting from sales



By Rick Hill

It's Friday night at 6 p.m., and I am officially done with work. I am sitting in my yard, looking at the millpond, in front of a bonfire. While all this serenity is passing by, I am also typing this article on my laptop. The house is set up with a wireless router, and it reaches about 70 ft. outside of the house. The laptop is really a Tablet PC with a built-in wireless modem. From my lawn chair, I can check my e-mail, scan recent stocks, check out competitors' websites and write this article.

And therein lies the dilemma. I can do all of these things, but I am a fool for doing them.

I am not the only fool out here. At the boat landing on the east edge of the lot line, a boy of around 10 is fishing. He often comes down in the early evening and fishes for Northern or bull heads. He works the shoreline with two poles. One has a bobber with worms to attract bluegills and the other he casts using a Mepps twister for Northern. He is usually successful with a few fish every evening. But today is different; there is a change in his routine. Tonight he has a cell phone.

Voices carry far over water. I can hear him talk to friends. Chat with his mother on his forgotten chores, and work out arrangements for his dad to pick him up from fishing.

All this takes time, and he is distracted from his casting. The young man is "multitasking," and using his time efficiently, but he doesn't seem to catch as many fish.

Just as technology distracts me from relaxing with an evening beer while watching a bonfire, it also distracts the young man from his catch.

OVERCOMING TECHNOLOGICAL DISTRACTIONS

The same holds true for any technology we employ in our work. E-mails, blogs, podcasts, Customer Relationship Managers, (CRM) Blackberry devices, iPhones, they all offer a new path to doing the same work. But do they make our jobs easier or more confusing? Many are just more distractions pulling us away from catching our fish.

In my last article I gave the example of the sales team that reported in to their manager on their Blackberry devices. The Blackberry (or Crackberry, as some have called it) allows you to get and send your e-mails from anywhere the cell towers reach. It is a handy device that also doubles as a phone, account directory, calendar and personal organizer.

It is also a distraction from accomplishing more

sales if you let it be. Just because an e-mail has appeared in your Blackberry, does not mean you should answer it. Just as a voice mail in your phone system can be saved for later, so can your e-mail. The key to any technology you use, whether it is a Tablet PC, Blackberry or cell phone, is prioritizing your response to the information you receive. The more time you spend answering unimportant requests, the less time for the important ones.

The successful people we see and emulate have just as many distractions as we do; they just know which ones to spend time on.

When I purchased this Tablet PC, I envisioned writing on it just as I do with notepaper and then having all my handwritten notes automatically appear in my CRM software. We use ACT, and the Tablet PC Manual specifically stated it would work with ACT.

Unbeknownst to me, and to the Tablet PC software, not only was my handwriting unrecognizable to the computer, but so were the terms used commonly in our industry.

The handwritten word "edgebänder" appeared in my notes as "entertainer." The words "Polyurethane Glue," appeared as "portly mean guy." So in my computer when working on a quote for a large user, I would look back on my notes and see that I had entertained a portly mean guy at \$4.20 a pound.

UPGRADING FOR THE RIGHT REASONS

Technology is only useful when it makes our lives easier, not more complicated. More information is not necessarily good information.

When looking at technology and information systems for sales functions, the focus should be less on speed and more on information accessibility.

We recently upgraded to the new software for our ACT Customer Relationship Management (CRM) program. The last time we tried to upload the new ACT software, we converted everything over before we found out our local technician had no idea how the new programs worked. We also learned the hard way that the new upgrade was actually brand-new software, not just an upgrade. We couldn't convert the information back to our old software. Fortunately, the smarter people in my company insisted we save both programs until we were sure the upgrade worked. We lost a couple of weeks of data, but the majority of information was intact. This time we had learned from our past mistakes and waited two years to upgrade.

Now we do three things before we upgrade.

1. We call our local technician and ask if he has any experience with the new program. Are any of his customers using it now? How do they like it? Does it perform all the functions we use?

2. Will the new program work with our existing peripheral software. Does it work with our current versions of e-mail, mail merge, accounting and document reader software?

3. Is the upgrade needed? Does it perform some new task we are hoping to accomplish?

If these three criteria cannot be achieved, we do not upgrade.

The latest version of our CRM gives us two big advantages; it lets us attach e-mails to individual contacts giving us a history of every quote and e-mail in an easily retrievable form. It also synchronizes all the separate laptops into one usable database.

Synchronized data is the key to any sales system you consider. Whether it is ACT, Goldmine, Salesforce.com or any other of the myriad of CRMs available, if the system will not allow multiple people to add, use and retrieve the data, the system is useless to your sales team. Avoid any gadget that cannot talk directly with your existing systems, as they will just require more data entry time.

Synchronized databases are a pretty simple idea. They allow everyone who has input into a customer's project the ability to add, delete and record the information in the customer's screen. This information is then available to everyone who deals with the customer.

For example, let's say I just made a call on Joe's Cabinet Shop. Before I met with Joe, I called him to set up the appointment. The call was in my database's calendar as a task I had to do. When I called Joe, I made an appointment to go see him. The phone call was checked off and went into Joe's history file. After my appointment with him, I input the notes of our meeting and sent e-mails requesting the samples Joe wanted. The meeting went into the history file and the e-mails were attached to it. I set up a follow-up call with Joe for three weeks from now to follow up on his receiving the samples.

If Joe calls my office looking for the samples, anyone in my office can look at his history and see what he needs. They can contact the vendor, check the date of shipment and let Joe know when to expect them. If a sales manager calls in and wants to know the progress with Joe's Cabinet Shop, anyone in our office can tell him.

Not only has the synchronized database given Joe the information he wants, it has also saved my company dozens of phone calls and reports. When the information is easily retrievable, there is no need for sales reports, call reports or paper files. Every action you have taken on behalf of the customer is recorded in their file. Anyone in the company can access it and help the customer. When a sales team uses their CRM as their central

activity calendar, you never have to ask them for call reports or schedules. All you have to do is look at the employees' calendar for past and future activities to get an idea of their workload.

Many companies struggle with getting their sales team to enter client information into CRM databases. It's not because the salespeople are unwilling; it is because they see no value to it. As a company evaluates these systems, they need to look at eliminating the redundancies in their current sales reporting methods. When you tell salespeople that if they use these systems, they will never have to fill out another task list or call report, you will get their interest. If you also point out they will only enter the data once and never again, you will have a few early converts. But as you show them that the inside support staff will be able to actually help customers immediately, you will have the majority onboard.

Any software system that actually helps salespeople make sales with fewer calls, less inside company politics, and speeds company response times will be adopted.

Yes, the new iPhone is cool, and I know you are addicted to your instant e-mail notification on your Crackberry, but until any gadget actually saves you time while reducing your data entry, it is a distraction — not an addition to your sales arsenal.

DISTRACTION VS. AN ADDITION

Distraction

Do you thumb e-mails and customer notes into a Blackberry or Treo? Why not get a wireless cell phone card in your laptop? It allows you to send and receive e-mails with attachments the same as a Blackberry. These can be linked to your database immediately and save you the time of downloading information between your database and your small hand-held gadget. The cell areas are expanding every-

day, so soon the coverage will be just as good.

Distraction

Having a GPS program on your laptop or phone is another distraction. The screens are too small on phones and too big on the laptops. I've traveled with several people that run MapQuest or a laptop GPSs. The laptops are always riding in the passenger seat where the driver has to turn to

look at them. The new dash-mounted GPS devices are portable, easy to see and quicker to boot up. As much as I advocate using one central item for your information, like a laptop over a Blackberry, the safety factor of the new GPS systems far outweigh the flying laptops in a car crash.

Distraction

A cell phone without a headset is the most

common distraction. For under \$100 you can get a wireless headset that frees up your hands for driving or eating French fries. Not only are wireless headsets safer, you won't starve to death.

TIME WASTER

After my article on lean sales methods (June

2007), the e-mails and phone were busy with colleagues debating my statements about eliminating call reports for salespeople. One good debate with the president of a large cabinet door company brought up some good points in favor of reports. My feeling is that we are all missing the larger picture.

"No reports" does not mean no information.

It means no repeating of the information. If you invest in a synchronized database for all your sales team, the information on customer visits, activities, quotes and action items is still required. In fact it has to be in more detail than salespeople are used to doing. As salespeople start to use these systems, they will find that the better

notes they input, the more the support staff can help. The change comes when management realizes that all the information they want is immediately available in the database. They never have to take their salespeople out of the field to write reports because every action is automatically recorded in the database. Want to know where they were last Wednesday? Just look on their calendar for last Wednesday. Want to see what your largest customer thinks about the new door style? Just look at the notes from the sales call on the new style.

We know many salespeople will fight these systems just because of the change in methods they require, but as one of those past reluctant salespeople, I can only preach the gospel of the converted. The new systems are easy to use and make every day efficient. I feel I gain more time, and I know my sales have increased because of them.

Lastly, they bring a peace of mind that only comes from knowing all your activities, information and tasks are in control. With that peace of mind in my work, I can shut down this laptop and enjoy the bonfire. Maybe I will even multitask and throw out a worm on a bobber. 🐛

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